

### **CASE ASSISTANT**

**DEFINITION:** Under immediate supervision, performs clerical work assisting higher level staff in managing cases; performs related work as assigned.

**ESSENTIAL FUNCTIONS:** This list is ILLUSTRATIVE ONLY and is not a comprehensive listing of all functions and tasks performed by incumbents of this class.

#### **TASKS:**

Informs clients of program eligibility criteria; takes application and/or completes intake forms and conducts initial interview; determines eligibility and develops plan for clients for approval by appropriate staff according to applicable rules and regulations; conducts home visits; establishes and maintains case files by updating progress notes and other documents; interacts with vendors/contractors requesting bids on materials and project work; prepares financial documents (e.g. purchase requisitions, purchase orders).

Establishes an accounting system to manage financial records and documents pertaining to client's needs; prepares required reports; logs in mail; establishes and maintains filing system; files and types documents (e.g. reports, memoranda, correspondence); answers telephones and assists callers or refers caller to more knowledgeable staff; provides support to the program staff by scheduling appointments, preparing appointment letters and other correspondence; provides orientation on program services; transports clients as needed.

#### **KNOWLEDGE, SKILLS AND OTHER CHARACTERISTICS:**

Knowledge of the programs available to clients.

Knowledge of the basic principles and practices of budgeting.

Knowledge of applicable Tribal, federal, state, and local laws, ordinances, statutes, rules, regulations, policies and procedures.

Knowledge of standard office equipment.

Skill in operating standard office equipment.

Skill in working with computers and applicable software applications.

Skill in evaluating clients to determine eligibility for programs for the underprivileged.

Skill in applying judgment in the release of and safeguarding confidential information.

Skill in interacting with people in all social, economic, cultural, spiritual and emotional places.

Skill in keyboarding.

**PHYSICAL REQUIREMENTS AND WORK ENVIRONMENT:** Work involves clerical efforts in a normal office setting.

#### **MINIMUM QUALIFICATIONS:**

- A high school diploma or GED; and two (2) years of clerical work experience including customer services.

#### **PREFERRED QUALIFICATIONS:**

- Proficient in Microsoft Office software or other computer applications.
- College courses in Business Administration, Behavioral Science, Counseling or related field.

#### **SPECIAL REQUIREMENTS:**

- Possess a valid state driver's license.

THE NAVAJO NATION

Class Code: 3764  
Community Education and Counseling Series  
Case Worker Group  
Overtime Code: Non-Exempt  
Pay Grade: 56

**CASE ASSISTANT**

**Supplemental Requirements:**

Incumbents must obtain a Navajo Nation Vehicle Operator's Permit within 90 days of date of hire.

Depending upon the needs of the Nation, some incumbents of the class may be required to demonstrate fluency in both the Navajo and English languages as a condition to employment.